

Oakland County Department of Information Technology Project Scope and Approach

Project Name: Marketing Automation Application Implementation Project ID: DE3120MA

Leadership Group: Finance/Admin					
Department: Department of Public Communications			Division: Public Communications		
Project Sponsor: Kaitlin Keeler		Date Requested: 3/3/2022		PM Customer No. 120	
Request Type: <i>New Development</i>					
IT Team Name: eGovernment			IT Team No: E		
Project Manager/Leader: Stacy Metcalf					
Account Number:	95361	Account Description:	Communications Department - Dev	Customer Name:	Public Communications
Grant Funded?		Yes <u>No</u>	Mandate?		Yes <u>No</u>
			Mandate Source:		

Project Goal

To source and implement a Marketing Automation (MA) tool so that the Department of Public Communications (DPC) can manage the full content lifecycle for communications and community engagement.

Business Objective

Obtain and implement a MA tool to meet the required needs of the Department of Public Communications (DPC) that will enable them to engage with constituents across all touchpoints and channels. In addition, the tool will increase DPC's ability to build brand consistency, a unified customer experience, and ability to adhere to compliance/regulations. This can enable the DPC to collaborate with other County departments using integrated processes and functionality for content creation and content production resulting in streamlined approvals and delivery.

Major Deliverables

- Create and execute an RFP
- Detailed Project Plan
- Application and/or System Requirements
- Technical Architecture Diagram
- User Acceptance Test Plan
- Implementation Plan
- Training/User Manual(s)
- Disaster Recovery Toolkit
- Service Center Knowledge Documents

Oakland County Department of Information Technology Project Scope and Approach

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Approach

- Write the RFP
- Review RFP responses
- Request and attend demonstrations
- Select a vendor/implementor
- Perform contract negotiations
- Develop Detailed Project Plan
- Review current business process and conduct needs assessment with customer
- Document system requirements
- Determine and document system architecture and diagram
- Conduct Tech Review
- Develop Implementation Plan
- Configure new system
- Develop User Acceptance Test Plan
- Test new system
- Acquire User Acceptance Sign off
- Conduct Change Control
- Develop User Documentation, Disaster Recovery Toolkit, Service Center

Knowledge Documents

- Train users on new system
- Release new system into production

Research & Analysis

Gartner Research Recommendation

Benefits

See Return on Investment (ROI) Analysis Document

Impact

Number of Users 30

Divisions Public Communications

Leadership Groups Finance/Admin

**Oakland County
Department of Information Technology
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Risk

Business Environment

High – Project with dramatically change existing business processes or will negatively affect the business environment if implementation is unsuccessful.

Technical Environment

High – New or non-standard technology.

Assumptions

Staffing IT Staffing: resources will be available for the hours indicated per the attached project plan.

Other Staffing: additional staffing will be available as follows:

<u>Role:</u>	<u>Name</u>	<u>Hours per Day</u>
Project Sponsor:	Kaitlin Keeler	As Needed
Stakeholders:	Pam Tremble	As Needed

Facilities

-

Technical

-

Funding

-

Other

-

Priority

-

**Oakland County
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Constraints

-
-

Exclusions

-
-

**Oakland County
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Project Scope and Approach**

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PROJECT PHASE AUTHORIZATION

Phase(s): PROJECT MANAGEMENT, IP, VENDOR MNGT & SME, DEVELOP RFP & SELECT VENDOR, DEFINE BUSINESS REQUIREMENTS, DESIGN SYSTEM ARCHITECTURE, DEVELOP APPLICATION, IMPLEMENTATION PHASE, POST IMPLEMENTATION SUPPORT	
Total Estimated Application Services	Hours: 783
Total Estimated Technical Systems	Hours: 29
Total Estimated CLEMIS	Hours:
Total Estimated Internal Services	Hours:
IT Application Services Division Manager Approval:	Date:
IT Technical Systems Division Manager Approval:	Date:
IT CLEMIS Division Manager Approval:	Date:
IT Internal Services Division Manager Approval:	Date:
IT Management Approval:	
Approved: <input type="checkbox"/> Yes <input type="checkbox"/> No	Date:
Reason:	
Project Sponsor Approval:	
Title:	Date:

PROJECT SUMMARY

Authorized Development (see above)	Hours:
Previously Authorized Development	Hours:
Preliminary Estimated Development for Future Phases	Hours:
Grand Total Estimated Development	Hours: 812 Cost: \$133,980

Oakland County Department of Information Technology Project Scope and Approach

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PROJECT COMPLETION AUTHORIZATION

Customer Acceptance of Product:	
Title:	Date:
Project Office Review:	Date:

Marketing Automation Application Implementation - Size Estimate (+/- 10% to 50%)

1	Type	ID	Task Name	Estimated Hours	Estimate Notes
2					
3		000000	PROJECT MANAGEMENT	239	
4	Phase	100000	DEVELOP RFP & SELECT VENDOR	210	
5	Phase	200000	DEFINE BUSINESS REQUIREMENTS	50	
6	Phase	300000	DESIGN SYSTEM ARCHITECTURE	73	
7	Phase	500000	DEVELOP APPLICATION	165	
8	Phase	600000	IMPLEMENTATION PHASE	53	
9	Phase	800000	POST IMPLEMENTATION SUPPORT	22	
10				812	

Oakland County -- Marketing Automation Application Implementation

Return on Investment Analysis

Project Summary

Description	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Total
Benefits/Savings:							
Tangible Benefits Subtotal:	0	0	0	0	0	0	0
Cost Avoidance Subtotal:	588	588	588	588	588	588	3,528
Costs:							
Development Services Subtotal:	153,980	5,024	11,899	5,176	12,259	5,333	193,671
Hardware Subtotal:	0	0	0	0	0	0	0
Software Subtotal:	200,000	204,000	208,080	212,242	216,486	220,816	1,261,624
Infrastructure Subtotal:	0	0	0	0	0	0	0
Training Subtotal:	0	0	0	0	0	0	0
Other Subtotal:	0	0	0	0	0	0	0
Annual Statistics:							
Annual Total Savings	588	588	588	588	588	588	3,528
Annual Total Costs	353,980	209,024	219,979	217,418	228,745	226,149	1,455,295
Annual Return on Investment	(353,392)	(208,436)	(219,391)	(216,830)	(228,157)	(225,561)	(1,451,767)
Annual Costs/Savings Ratio	60200.68%	35548.34%	37411.41%	36975.80%	38902.24%	38460.67%	
Project Cumulative Statistics:							
Cumulative Total Savings	588	1,176	1,764	2,352	2,940	3,528	3,528
Cumulative Total Costs	353,980	563,004	782,983	1,000,401	1,229,146	1,455,295	1,455,295
Cumulative Return on Investment	(353,392)	(561,828)	(781,219)	(998,049)	(1,226,206)	(1,451,767)	(1,451,767)
Cumulative Cost/Savings Ratio	60200.68%	47874.51%	44386.81%	42534.06%	41807.70%	41249.86%	41249.86%
Year Positive Payback Achieved							NO PAYBACK
State or Federal Mandate?							
Signatures:							
Benefits Reviewed By Project Sponsor	_____			Date:	_____		
Costs (including IT Resources) Reviewed By Information Technology Project Manager	_____			Date:	_____		

Oakland County -- Marketing Automation Application Implementation

Return on Investment Analysis

Savings Detail

Benefit/Savings Description	Project Savings Category	Budget Category/Funding Source	Unit Desc	Units	Rate per Unit	Total Savings	Annual Multiplier
Increased ability to build trust with brand consistency across content and customer service throughout all communication channels.	Intangible Benefit					0	
Ability to create and store content creation and publishing templates that can be shared with departments to ensure brand standards are met	Intangible Benefit					0	
Increased ability to follow requirements such as ADA accessibility requirements for content creation and publishing alt text, captions, etc.	Intangible Benefit					0	
Better/Unified Customer Experience – ensure consistent message in content and customer service; additional scope of measurements will drive content personalization.	Intangible Benefit					0	
Analytics/Reporting tools will facilitate data driven decisions on content (sentiment analysis and performance metrics)	Intangible Benefit					0	
Streamlined review, approval, and publishing process across County departments will reduce time and build efficiencies with automations and workflows.	Intangible Benefit					0	
Hootsuite software and licensing costs	Cost Avoidance		ANN	1	588	588	

Oakland County -- Marketing Automation Application Implementation

Return on Investment Analysis

Savings Detail

Benefit/Savings Description	Project Savings Category	Affects Project ROI?						Potential Savings Extensions						
		Y1	Y2	Y3	Y4	Y5	Y6	Y1	Y2	Y3	Y4	Y5	Y6	
Increased ability to build trust with brand consistency across content and customer service throughout all communication channels.	Intangible Benefit													
Ability to create and store content creation and publishing templates that can be shared with departments to ensure brand standards are met	Intangible Benefit													
Increased ability to follow requirements such as ADA accessibility requirements for content creation and publishing alt text, captions, etc.	Intangible Benefit													
Better/Unified Customer Experience – ensure consistent message in content and customer service; additional scope of measurements will drive content personalization.	Intangible Benefit													
Analytics/Reporting tools will facilitate data driven decisions on content (sentiment analysis and performance metrics)	Intangible Benefit													
Streamlined review, approval, and publishing process across County departments will reduce time and build efficiencies with automations and workflows.	Intangible Benefit													
Hootsuite software and licensing costs	Cost Avoidance	x	x	x	x	x	x	588.00	588.00	588.00	588.00	588.00	588.00	588

Oakland County -- Marketing Automation Application Implementation

Return on Investment Analysis

Savings Summary

Benefit/Savings Description	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Total
Increased ability to follow requirements such as ADA accessibility requirements for content creation and publishing alt text, captions, etc.							
Better/Unified Customer Experience – ensure consistent message in content and customer service; additional scope of measurements will drive content personalization.							
Analytics/Reporting tools will facilitate data driven decisions on content (sentiment analysis and performance metrics)							
Streamlined review, approval, and publishing process across County departments will reduce time and build efficiencies with automations and workflows.							
Savings Total:	588	588	588	588	588	588	3,528

Oakland County -- Marketing Automation Application Implementation
Return on Investment Analysis

Cost Detail

Cost Description	Project Cost Category	Budget Category/Funding Source	Unit Desc	Units	Rate per Unit	Total Cost	Annual Multiplier	Affects Project ROI?							
								Y1	Y2	Y3	Y4	Y5	Y6		
IT Hours - New Development	Development Svcs			812	165	133,980		X							
IT Hours - System Maintenance	Development Svcs			10	165	1,650	1.015		X	X	X	X	X	X	
IT Hours - Customer Support	Development Svcs			20	165	3,300	1.015		X	X	X	X	X	X	
IT Hours - Planned Maintenance	Development Svcs			40	165	6,600	1.015			X		X			
User Hours - New Development	Development Svcs					0									
User Hours - PTNE/OT	Development Svcs					0									
Contractor Professional Services	Development Svcs			1	20,000	20,000		X							
PC System - Acquisition	Hardware				687	0									
PC System - Maintenance	Hardware				2,936	0									
Notebook - Acquisition	Hardware				1,115	0									
Notebook - Maintenance	Hardware				3,024	0									
Tablet Notebook - Acquisition	Hardware				1,421	0									
Tablet Notebook - Maintenance	Hardware				2,800	0									
Laserprinter - Acquisition	Hardware				1,432	0									
Laserprinter - Maintenance	Hardware				1,408	0									
PC Maintenance User Owned	Hardware				2,720	0									
Printer Maintenance User Owned	Hardware				1,264	0									
File Space (100GB)	Hardware		ANN		23	0									
Package Software - Acquisition	Software		ANN	1	200,000	200,000		x							
Package Software - Maintenance	Software		ANN	1	200,000	200,000	1.020		x	x	x	x	x	x	
Business Objects Access	Software					0									
Term Emulation SFTW-Acquisition	Software					0									
Term Emulation SFTW-Maintenance	Software					0									
Server - Acquisition/Upgrade	Infrastructure				8,000	0									
Server - Maintenance	Infrastructure				360	0									
Server Sftwre - Acquisition/Upgrade	Infrastructure				335	0									
Server Sftwre - Maintenance	Infrastructure					0									
Server Rack Mount	Infrastructure				400	0									
Oracle Enterprise Software Purchase - Per Processor (4 Cores) - Requires Annual Support Below	Infrastructure				42,280	0									
Oracle Enterprise Software Support - Per Processor (4 Cores)	Infrastructure				9,293	0									

Oakland County -- Marketing Automation Application Implementation
Return on Investment Analysis

Cost Detail

Cost Description	Project Cost Category	Budget Category/Funding Source	Unit Desc	Units	Rate per Unit	Total Cost	Annual Multiplier	Affects Project ROI?							
								Y1	Y2	Y3	Y4	Y5	Y6		
SQL Server Enterprise Software Purchase - Per Processor (4 cores) - Purchased Sept 2019-Aug 2020 - Includes Support thru Aug 2022	Infrastructure				16,985	0									
SQL Server Enterprise Software Purchase - Per Processor (4 cores) - Purchased Sept 2020-Aug 2021 - Includes Support thru Aug 2022	Infrastructure				12,724	0									
SQL Server Enterprise Software Purchase - Per Processor (4 cores) - Purchased Sept 2021-Aug 2022 - Includes Support thru Aug 2022	Infrastructure				8,463	0									
SQL Server Enterprise - Support, Per Processor (4 cores) - Sept 2022 and Beyond	Infrastructure				4,261	0									
SQL Server Standard Software Purchase - Per Processor (4 cores) - Purchased Sept 2019-Aug 2020 - Includes Support thru Aug 2022	Infrastructure				4,429	0									
SQL Server Standard Software Purchase - Per Processor (4 cores) - Purchased Sept 2020-Aug 2021 - Includes Support thru Aug 2022	Infrastructure				3,317	0									
SQL Server Standard Software Purchase - Per Processor (4 cores) - Purchased Sept 2021-Aug 2022 - Includes Support thru Aug 2022	Infrastructure				2,205	0									
SQL Server - Standard Support, Per Processor (4 cores) - Sept 2022 and Beyond	Infrastructure				1,112	0									
Websphere Basic Per Processor Single/Dual Core - Includes Year 1 Maintenance	Infrastructure				3,506	0									

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Return on Investment Analysis

Cost Detail

Cost Description	Project Cost Category	Budget Category/Funding Source	Unit Desc	Units	Rate per Unit	Total Cost	Annual Multiplier	Affects Project ROI?						
								Y1	Y2	Y3	Y4	Y5	Y6	
Websphere Basic Per Processor Single/Dual Core - Year 2 and Beyond	Infrastructure				701	0								
Websphere ND Per Processor Single/Dual Core - Includes Year 1 Maintenance	Infrastructure				13,180	0								
Websphere ND Per Processor Single/Dual Core - Year 2 and Beyond	Infrastructure				2,635	0								
SSL Certificate	Infrastructure				845	0								
Internet Access	Infrastructure				180	0								
Imperva Web Application Firewall (External Web Applications Only)	Infrastructure		ANN		500	0								
App Code Directories on Consolidated IIS Server (Virtual)	Infrastructure		ANN		415	0								
Dedicated Virtual Server	Infrastructure		ANN		4,150	0								
Extra Small - 2 Core 8GB RAM, 500GB Drive, 10 GB NIC - Cloud/Virtual = \$601 On Premise Physical Server = N/A	Infrastructure		ANN			0								
Small - 4 Core 16GB RAM, 500GB Drive, 10 GB NIC - Cloud/Virtual = \$951 On Premise Physical Server = \$9,288	Infrastructure		ANN			0								
Medium - 8 Core 32GB RAM, 500GB Drive, 10 GB NIC - Cloud/Virtual = \$1,702 On Premise Physical Server = \$9,751	Infrastructure		ANN			0								
Large - 16 Core 64GB RAM, 500GB Drive, 10 GB NIC - Cloud/Virtual = \$3,167 On Premise Physical Server = \$10,446	Infrastructure		ANN			0								

Oakland County -- Marketing Automation Application Implementation

Return on Investment Analysis

Cost Detail

Cost Description	Project Cost Category	Budget Category/Funding Source	Unit Desc	Units	Rate per Unit	Total Cost	Annual Multiplier	Affects Project ROI?							
								Y1	Y2	Y3	Y4	Y5	Y6		
Extra Large - 40 Core 160GB RAM, 500GB Drive, 10 GB NIC - Cloud/Virtual = \$7,564 On Premise Physical Server = \$12,906	Infrastructure		ANN			0									

Oakland County -- Marketing Automation Application Implementation
Return on Investment Analysis

Cost Detail

Cost Description	Project Cost Category	Potential Cost Extensions					
		Y1	Y2	Y3	Y4	Y5	Y6
IT Hours - New Development	Development Svcs	133,980.00					
IT Hours - System Maintenance	Development Svcs		1,674.75	1,699.87	1,725.37	1,751.25	1,777.52
IT Hours - Customer Support	Development Svcs		3,349.50	3,399.74	3,450.74	3,502.50	3,555.04
IT Hours - Planned Maintenance	Development Svcs			6,799.49		7,005.00	
User Hours - New Development	Development Svcs						
User Hours - PTNE/OT	Development Svcs						
Contractor Professional Services	Development Svcs	20,000.00					
PC System - Acquisition	Hardware						
PC System - Maintenance	Hardware						
Notebook - Acquisition	Hardware						
Notebook - Maintenance	Hardware						
Tablet Notebook - Acquisition	Hardware						
Tablet Notebook - Maintenance	Hardware						
Laserprinter - Acquisition	Hardware						
Laserprinter - Maintenance	Hardware						
PC Maintenance User Owned	Hardware						
Printer Maintenance User Owned	Hardware						
File Space (100GB)	Hardware						
Package Software - Acquisition	Software	200,000.00					
Package Software - Maintenance	Software		204,000.00	208,080.00	212,241.60	216,486.43	220,816.16
Business Objects Access	Software						
Term Emulation SFTW-Acquisition	Software						
Term Emulation SFTW-Maintenance	Software						
Server - Acquisition/Upgrade	Infrastructure						
Server - Maintenance	Infrastructure						
Server Sftwre - Acquisition/Upgrade	Infrastructure						
Server Sftwre - Maintenance	Infrastructure						
Server Rack Mount	Infrastructure						
Oracle Enterprise Software Purchase - Per Processor (4 Cores) - Requires Annual Support Below	Infrastructure						
Oracle Enterprise Software Support - Per Processor (4 Cores)	Infrastructure						

Oakland County -- Marketing Automation Application Implementation
Return on Investment Analysis

Cost Detail

Cost Description	Project Cost Category	Potential Cost Extensions					
		Y1	Y2	Y3	Y4	Y5	Y6
SQL Server Enterprise Software Purchase - Per Processor (4 cores) - Purchased Sept 2019-Aug 2020 - Includes Support thru Aug 2022	Infrastructure						
SQL Server Enterprise Software Purchase - Per Processor (4 cores) - Purchased Sept 2020-Aug 2021 - Includes Support thru Aug 2022	Infrastructure						
SQL Server Enterprise Software Purchase - Per Processor (4 cores) - Purchased Sept 2021-Aug 2022 - Includes Support thru Aug 2022	Infrastructure						
SQL Server Enterprise - Support, Per Processor (4 cores) - Sept 2022 and Beyond	Infrastructure						
SQL Server Standard Software Purchase - Per Processor (4 cores) - Purchased Sept 2019-Aug 2020 - Includes Support thru Aug 2022	Infrastructure						
SQL Server Standard Software Purchase - Per Processor (4 cores) - Purchased Sept 2020-Aug 2021 - Includes Support thru Aug 2022	Infrastructure						
SQL Server Standard Software Purchase - Per Processor (4 cores) - Purchased Sept 2021-Aug 2022 - Includes Support thru Aug 2022	Infrastructure						
SQL Server - Standard Support, Per Processor (4 cores) - Sept 2022 and Beyond	Infrastructure						
Websphere Basic Per Processor Single/Dual Core - Includes Year 1 Maintenance	Infrastructure						

Oakland County -- Marketing Automation Application Implementation
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Cost Detail

Cost Description	Project Cost Category	Potential Cost Extensions					
		Y1	Y2	Y3	Y4	Y5	Y6
Websphere Basic Per Processor Single/Dual Core - Year 2 and Beyond	Infrastructure						
Websphere ND Per Processor Single/Dual Core - Includes Year 1 Maintenance	Infrastructure						
Websphere ND Per Processor Single/Dual Core - Year 2 and Beyond	Infrastructure						
SSL Certificate	Infrastructure						
Internet Access	Infrastructure						
Imperva Web Application Firewall (External Web Applications Only)	Infrastructure						
App Code Directories on Consolidated IIS Server (Virtual)	Infrastructure						
Dedicated Virtual Server	Infrastructure						
Extra Small - 2 Core 8GB RAM, 500GB Drive, 10 GB NIC - Cloud/Virtual = \$601 On Premise Physical Server = N/A	Infrastructure						
Small - 4 Core 16GB RAM, 500GB Drive, 10 GB NIC - Cloud/Virtual = \$951 On Premise Physical Server = \$9,288	Infrastructure						
Medium - 8 Core 32GB RAM, 500GB Drive, 10 GB NIC - Cloud/Virtual = \$1,702 On Premise Physical Server = \$9,751	Infrastructure						
Large - 16 Core 64GB RAM, 500GB Drive, 10 GB NIC - Cloud/Virtual = \$3,167 On Premise Physical Server = \$10,446	Infrastructure						

Oakland County -- Marketing Automation Application Implementation
Return on Investment Analysis

Cost Detail

Cost Description	Project Cost Category	Potential Cost Extensions					
		Y1	Y2	Y3	Y4	Y5	Y6
Extra Large - 40 Core 160GB RAM, 500GB Drive, 10 GB NIC - Cloud/Virtual = \$7,564 On Premise Physical Server = \$12,906	Infrastructure						

Oakland County -- Marketing Automation Application Implementation

Return on Investment Analysis

Cost Summary

Cost Description	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Total
Development Services:							
IT Hours - New Development	133,980						133,980
IT Hours - System Maintenance		1,675	1,700	1,725	1,751	1,778	8,629
IT Hours - Customer Support		3,350	3,400	3,451	3,502	3,555	17,258
IT Hours - Planned Maintenance			6,799		7,005		13,804
User Hours - New Development							
User Hours - PTNE/OT							
Contractor Professional Services	20,000						20,000
<i>Development Services Subtotal:</i>	153,980	5,024	11,899	5,176	12,259	5,333	193,671
Hardware:							
<i>Hardware Subtotal:</i>							
Software:							
Package Software - Acquisition	200,000						200,000
Package Software - Maintenance		204,000	208,080	212,242	216,486	220,816	1,061,624
<i>Software Subtotal:</i>	200,000	204,000	208,080	212,242	216,486	220,816	1,261,624
Infrastructure:							
<i>Infrastructure Subtotal</i>							
Training:							

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Return on Investment Analysis

Cost Summary

Cost Description	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Total
<i>Training Subtotal:</i>							
Other:							
<i>Other Subtotal:</i>							
Costs Total:	353,980	209,024	219,979	217,418	228,745	226,149	1,455,295

